



# Division of Family Resources

## Training Team June 2019



### Intuitions: Retro Resources

**Step 1:** During data collection at application point, the Logical Units of Work will take you the Liquid Assets detail page, where retro resources are entered. However, after data collection is complete, use the “Case Change” Action from the Quick Jump on the home page.

QUICK JUMP

Case or Application #: 612345678

Action: Case Change

GO

**Step 2:** This will open the case home page. Ensure that “Data Collection” is selected from the top navigation bar and then click on the “Others” caret from the sub-navigation menu. This will open up a drop down menu. Select “resources” from the drop down menu.

Application Registration | Scheduling | Data Collection | Eligibility Determination | Redetermination | Others ^

Initiate Data Collection | Pending Casework | Individual Information | Household Information | Others ^

**Initiate Data Collection**

INITIATE DATA COLLECTION

Others ^

- Non Financial
- Non-Custodial Parent
- Compliance
- Resources**
- Income
- Expenses
- Wrap Up



# Intuitions: Retro Resources

**Step 3:** This will bring up the left navigation bar. Click the “+” to open the liquid assets, then click on “Liquid Asset”.

Application Registration Scheduling **Data Collection** Eligibility Determination Redetermination Others ^

Initiate Data Collection Pending Casework Individual Information Household Information Resources ^

Initiate Data Collection

INITIATE DATA COLLECTION

+ Questions  
- Liquid Asset  
+ Trust

+ Questions  
- Liquid Asset  
Summary  
Details

**Step 4:** This will bring up the “Liquid Asset - Summary”. Click on the pencil icon to edit.

## Liquid Asset - Summary

Owner(s)	Type	Amount	Account Number	End Date	Available?
	Checking Account	\$0.00	6318	01/31/2019	Yes

Page 1 of 1 10 View 1 - 1 of 1



# Intuitions: Retro Resources

**Step 5:** This brings up “Liquid Asset - Details”. Enter your CSCD date for the first retro month and enter the bank account information and balance.

**Liquid Asset - Details**

PERSON INFORMATION

Name:  
Person ID:

LIQUID ASSET DATES

Circumstances Start / Change Date: 02 / 01 / 2019  
End Date: MM / DD / YYYY  
Reported On: 04 / 29 / 2019  
Date Client Became Aware: 04 / 29 / 2019  
Verification Received On: 04 / 29 / 2019

LIQUID ASSET DETAILS

Liquid Asset Type: Checking Account  
Financial Institution: Chase  
Account Number:  
Is Liquid Asset jointly owned?: No  
Was this asset placed into a trust?: No  
Verification: Hard Copy

**Step 5:** Click “Continue”. Navigate back to the “Liquid Details page and update the CSCD date and the balance to the next retro month (this will cause your previous retro entry to go into history). Click “Continue”.

**Step 6:** Repeat the process as needed until all retro months and the application month balance have been entered. You can navigate through the history by using the up and down arrows on the bottom left.

**TRANSFER**

Was Liquid Resource transferred?: No

**AVAILABILITY**

Available?: Yes

Availability Verification

[reset form](#)

↑ ↓

PREVIOUS CANCEL CONTINUE